Alberta Tourism Market Monitor

Tourism indicators continue to show mixed signals

The tourism indicators tracked in this publication remain a mixed bag, with strong performances in some instances, and weaker performances in others.

Modest increase in air passenger traffic at Calgary International Airport while remaining flat at Edmonton International Airport

Traffic at Calgary International Airport grew by 2.1% in September (compared to Sept. 2014): domestic arrivals and departures increased by 3.4% compared to last September, which was offset by a slowdown in transborder (-0.1%) and international air traffic (-3.4%).

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Traffic at Edmonton International Airport edged down marginally by 0.5% in October, compared to the same month last year, after increases for both domestic and international traffic in the summer months. Please note: Air traffic numbers are only volume indicators and they do not provide information on the origin of visitors. These numbers represent tallies of people arriving and departing from the airports and do not take the nationality of travellers or their main trip purpose into account.

Solid performance for accommodation indices at Alberta's resorts

Alberta's accommodation indices also showed mixed signals in September. While occupancy rates declined in most of Alberta during this month (and for the year-to-date), Alberta resorts held their own in terms of growth with respect to occupancy rate (up 1.9 points from same month a year ago) and average daily room rate (up 12.8% from September 2014). This may be a sign that leisure travel remains strong on the back of a weaker Canadian dollar, which keeps Canadians travelling in Canada and attracts tourists from abroad, especially the United States.

Alberta's National Parks visitation continues upward trend

Furthermore, visitation at the three National Parks tracked also continued its upward trend in September indicating 2015 may well be another record year for Park visitor attendance. This could indicate that Albertans may be travelling closer to home due to the weak Canadian dollar and the fragile economy. Banff National Park recorded more than 433,000 visitors in September (up 8.8% from same month in 2014), while Jasper National Park welcomed almost 297,000 visitors (7.6% increase compared to last September). Waterton Lakes welcomed 59,700 visitors in September, an increase of 12.2% from last September.

2015 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2015 (000's of arrivals and departures) [1]													
Edmonton International Total	582.1p	561.6p	613.8p	592.7p	565.5p	598.8r	683.7r	710.0p	602.1p	**594.9p**			**6,105.2p**
Per cent change from 2014	-0.3%	-1.0%	-1.8%	-4.4%	-5.4%	0.9%	2.5%	0.2%	1.8%	**-0.5%**			**-0.7%**
Domestic	398.2p	380.9p	421.4p	413.4p	438.7p	490.9r	559.6p	583.4p	493.6p	**472.4p**			**4,652.4p**
Per cent change from 2014	-2.7%	-2.9%	-1.3%	-5.9%	-4.6%	2.7%	4.4%	2.0%	3.0%	**1.3%**			**-0.1%**
Transborder	118.2p	119.7p	129.1p	119.3p	95.1p	82.5p	93.5r	93.6p	81.3p	**97.0p**			**1,029.3p**
Per cent change from 2014	-0.3%	-3.0%	-7.8%	-9.0%	-12.9%	-10.2%	-10.1%	-13.2%	-10.8%	**-12.9%**			**-8.7%**
International	65.7p	61.0p	63.2p	60.1p	31.6p	25.4p	30.6p	32.9p	27.3p	**25.6p**			**423.5p**
Per cent change from 2014	16.8%	17.9%	9.8%	21.8%	10.5%	9.0%	14.6%	14.3%	27.4%	**27.0%**			**16.4%**
Calgary International Total	1,199.0p	1,149.3r	1,267.0r	1,225.7p	1,257.1p	1,304.8r	1,512.8r	1,557.4p	**1,289.3p**				**11,762.8p**
Per cent change from 2014	2.3%	-0.4%	1.5%	-2.3%	2.6%	3.2%	4.6%	1.8%	**2.1%**				**1.8%**
Domestic	800.6p	765.0p	839.7r	844.4p	909.8r	955.1r	1,100.8r	1,143.6p	**944.0p**				**8,303.6p**
Per cent change from 2014	1.1%	-0.9%	2.3%	-2.9%	4.8%	4.3%	4.7%	2.3%	**3.4%**				**2.3%**
Transborder	254.6p	253.4p	280.9p	252.1p	237.5r	243.5p	286.9r	285.5p	**242.0p**				**2,336.6p**
Per cent change from 2014	1.8%	-3.0%	-3.7%	-6.3%	-4.6%	2.9%	4.6%	1.1%	**-0.1%**				**-0.8%**
International	143.8p	130.8p	146.5p	129.2p	109.7p	106.2p	125.0r	128.3p	**103.2p**				**1,122.7p**
Per cent change from 2014	9.9%	8.0%	8.0%	10.6%	1.1%	-5.8%	4.5%	-0.7%	**-3.4%**				**3.8%**
Fort McMurray International Total	97.6	91.0	108.1	110.1	111.3	115.4	97.5	98.2	93.8				859.1
Per cent change from 2014	-3.6%	-8.6%	-10.0%	-15.1%	-17.3%	-14.9%	-16.9%	-13.9%	-19.0%				-13.5%
Highway Count 2015 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.7	57.3	64.7	72.8	80.1	85.4	111.1						529.1
Per cent change from 2014	3.2%	2.3%	3.9%	1.8%	3.6%	2.2%	6.8%						3.6%
Hwy 1 - Banff Pk Gate (2-way)	501.8	505.5	544.6	568.2	679.2	705.5	953						4,457.8
Per cent change from 2014	6.1%	12.6%	9.1%	6.7%	15.9%	6.9%	8.1%						9.2%
Hwy 16 - Jasper Pk Gate (2 way)	96.3	92.8	111.7	123.4	149.2	167.9	233.7						975
Per cent change from 2014	4.9%	9.6%	6.2%	-1.0%	7.0%	3.6%	4.1%						4.6%
Hwy 16 - Blackfoot w-bound	164.1	146.6	170.8	177.8	186.6	188.3	202.7						1,236.9
Per cent change from 2014	-3.2%	-7.0%	-6.5%	-5.2%	-7.0%	-5.9%	-7.8%						-6.2%
National Park Attendance (000's of visitors) 2015 [3] Does not include Group Tours													
Banff	184.9p	188.6p	203.8p	246.7p	296.4p	326.0p	630.5p	631.3p	433.0p				3,141.2p
Per cent change from 2014	8.1%	14.6%	10.7%	6.7%	14.8%	8.6%	12.4%	-0.3%	8.8%				8.3%
Jasper	52.8p	53.6p	64.1p	147.1p	178.1p	200.8p	433.3	444.9p	296.7p				1,871.4p
Per cent change from 2014	6.0%	11.1%	7.4%	3.5%	10.3%	5.5%	10.1%	-2.0%	7.6%				5.4%
Waterton Lakes	6.7p	7.5p	9.3p	14.8p	39.2p	73.5p	114.3p	114.1p	59.7p				439.1p
Per cent change from 2014	3.5%	19.1%	47.6%	34.5%	26.9%	22.9%	11.5%	6.8%	12.2%				14.6%
Employment (000's of persons) 2015 Seasonally Adjusted [4]													
Accommodation and Food Services	156.9p	157.6p	155.9p	152.8p	157.1p	157.7p	154.4p	155.1p	**150.5p**				**155.3p**
Per cent change from 2014	4.4%	1.5%	3.7%	0.9%	5.3%	9.2%	9.1%	8.8%	**2.2%**				**4.8%**

Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada, Statistics Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2015 [3]													
Edmonton Occupancy Rate	54.4%	65.3%	67.1%	67.7%	64.3%	69.7%	64.8%	63.9%	**64.5%**				**64.8%**
Point change from 2014	-3.9	-2.8	-7.1	-7.6	-9.1	-0.1	-1.2	-13.3	**-0.6**				**-5.7**
Average Daily Room Rate	$131.29	$134.52	$135.93	$134.91	$133.27	$138.75	$132.4	$132.58	**$135.14**				**$135.94**
Variance from 2014	1.4%	1.0%	0.5%	0.2%	-0.8%	1.3%	0.9%	-4.2%	**-2.2%**				**-0.7%**
Revenue per available room	$71.42	$87.81	$91.22	$91.40	$85.73	$96.77	$85.77	$84.73	**$87.13**				**$88.11**
Calgary Occupancy Rate	55.0%	61.8%	63.5%	64.1%	69.8%	70.2%	78.1%	75.3%	**71.1%**				**67.9%**
Point change from 2014	-3.0	-1.6	-4.1	-7.5	-1.1	-6.3	0.1	-3.9	**-8.4**				**-3.9**
Average Daily Room Rate	$156.48	$156.30	$156.76	$159.31	$159.78	$171.43	$185.06	$147.53	**158.12**				**$161.60**
Variance from 2014	-0.4%	-3.3%	-2.0%	-2.8%	-2.2%	-7.1%	-2.5%	-1.6%	**7.2%**				**-3.2%**
Revenue per available room	$86.08	$96.56	$99.56	$102.11	$111.55	$120.33	$144.48	$111.16	**$112.36**				**$109.67**
Alberta Resorts Occupancy Rate	40.8%	53.3%	48.8%	48.9%	60.6%	78.7%	90.9%	92.4%	**82.6%**				**66.6%**
Point change from 2014	2.8	7.8	3.7	2.7	-0.2	2.9	2.9	0.7	**1.9**				**2.8**
Average Daily Room Rate	$183.23	$177.86	$176.03	$170.91	$201.13	$260.92	$294.18	$299.60	**$260.20**				**$239.61**
Variance from 2014	10.5%	1.3%	5.4%	4.8%	6.8%	8.2%	10.9%	10.1%	**12.8%**				**8.4%**
Revenue per available room	$74.83	$94.88	$85.94	$83.51	$121.88	$205.47	$267.52	$276.75	**$214.84**				**$159.68**
Other Alberta* Occupancy Rate	52.5%	55.0%	53.3%	48.3%	51.3%	58.6%	59.0%	57.0%	**56.1%**				**54.6%**
Point change from 2014	-7.5	-11.5	-14.6	-11.4	-13.1	-8.3	-9.5	-14.0	**-15.6**				**-11.7**
Average Daily Room Rate	$133.36	$132.26	$131.29	$128.86	$126.21	$127.84	$128.17	$127.47	**$126.80**				**$129.24**
Variance from 2014	2.7%	1.1%	0.3%	-0.7%	-2.2%	-1.9%	-1.5%	-2.5%	**-4.3%**				**-1.0%**
Revenue per available room	$69.96	$72.74	$70.01	$62.20	$64.77	$74.90	$75.63	$72.71	**$71.08**				**$70.62**
Total Alberta (excl. Resorts) Occupancy Rate	53.8%	60.0%	60.2%	58.6%	60.4%	65.3%	66.5%	64.5%	**63.1%**				**61.6%**
Point change from 2014	-5.2	-6	-9.3	-9.0	-8.5	-5.3	-4.1	-10.8	**-10.6**				**-7.6**
Average Daily Room Rate	$139.70	$140.35	$140.75	$141.06	$139.71	$145.07	$149.69	$135.98	**$140.05**				**$141.95**
Variance from 2014	1.4%	0.0%	0.1%	-0.9%	-1.2%	-3.1%	-0.2%	-2.2%	**-4.2%**				**-1.2%**
Revenue per available room	$75.12	$84.22	$84.76	$82.69	$84.39	$94.68	$99.53	$87.74	**$88.31**				**$87.37**
Food Services and Drinking Places 2015 ($ Millions) unadjusted [6]													
Total Receipts for Alberta	$689.4r	$658.1r	$729.7r	$719.6r	$766.1r	**$741.1r**	**$767.3r**	**$762.7p**					**$729.2p**
Per cent change from 2014	6.0%	4.4%	1.6%	1.6%	1.7%	**0.5%**	**1.6%**	**0.5%**					**2.1%**
Historic Sites and Museums 2015 (000's of visitors) [7]													
Visitor Attendance	24.3p	42.4r	48.6p	48.5p	80.2p	113.0p	181.4p	190.8p	73.5p**	**39.4p**			**842.1p**
Per cent change from 2014	3.4%	6.5%	26.2%	2.1%	3.5%	-2.2%	13.0%	1.0%	23.7%	**-1.7%**			**6.4%**
Exchange Rates 2015 [8]													
Canadian Dollar/U.S. Dollar (noon)	0.81	0.80	0.79	0.81	0.82	0.81	0.76	0.76	0.75	**0.77**			**0.80**
Canadian Dollar/ Euro	0.71	0.71	0.73	0.75	0.74	0.82	0.69	0.68	0.67	**0.68**			**0.74**
Canadian Dollar/ Great British Pounds	0.53	0.52	0.53	0.54	0.53	0.52	0.49	0.49	0.49	**0.50**			**0.52**
Oil Price: Western Texas Intermediate (WTI) 2015 [9]													
Cushing, OK Spot Price (US Dollar per Barrel)	47.22	50.58	47.82	54.45	59.27	59.82	50.9	42.87	45.48	**46.22**			**50.46**
Major Tourism Projects Valued $5 million or Greater ($ Millions) [10]													
Total Value of Hotel Projects Inventory	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	**$1,200**	**$814**		**$814**
Sources: PKF Consulting Inc, Statistics Canada, Alberta Culture, Bank of Canada, WTI													

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

**Please note some of the historical sites have changed their hours of operation. Please see Notes section for details.

Note : New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports.
Source: Edmonton International Airport , Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

Revenue per available room is calculated using the occupancy rate and average daily room rate.
Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com.

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station.
**Royal Alberta Museum operational hours as of Sept 8, 2015: Mon-Wed Closed; Thursday - Open to pre-booked school groups; Fri-Sun Open 9:00 am to 5:00 pm.
Tyrrell Field Station closed on weekends and holidays starting October 17th.
Source: Alberta Culture.

8. **Exchange Rate**- this is the average monthly exchange rate.
Source: Bank of Canada.

9. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

10. Major hotel projects in Alberta - This is the inventory of major private and public sector projects related to tourism valued at $5 million or greater. It is not a complete list of hotel projects in Alberta.
Source: Government of Alberta. http://majorprojects.alberta.ca/

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